DAP USER GUIDE FOR MAP LENDERS

CHAPTER TWO – GETTING STARTED

TABLE OF REVISIONS

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Getting Started in DAP

This chapter introduces you to helpful features used in the Development Application Processing (DAP) system. The overall layout of DAP windows is described, including specific window components that you use to enter and edit application information.

Procedures are included for logging into DAP with your ID and password, and exiting DAP.

Once you review the basic functions and techniques covered in this chapter, you will be able to navigate and use any window in DAP.

Objectives

- Logging into the DAP application.

- Exiting the DAP application.

- Understanding User security.

- Using DAP windows.

- Navigating DAP windows.

- Entering and editing information in DAP.

- Using alternative command buttons.

2.1   Starting and Exiting the DAP System

The procedures in this section explain how to startup the DAP application and logon with your assigned user ID. Information for ending a DAP work session and returning to your desktop is also included.

2.1.1   Starting DAP

The DAP application is accessed from your desktop. Before beginning, be sure to obtain a DAP user ID.

To start the system with the DAP icon:

1.   Double-click the DAP icon [icon] on your desktop, and the DAP Main window displays with the Logon window open (Figure 2).

To start the system with the Windows Start button:

1.   Click [Start] located in the lower left corner of your desktop (Figure 1).
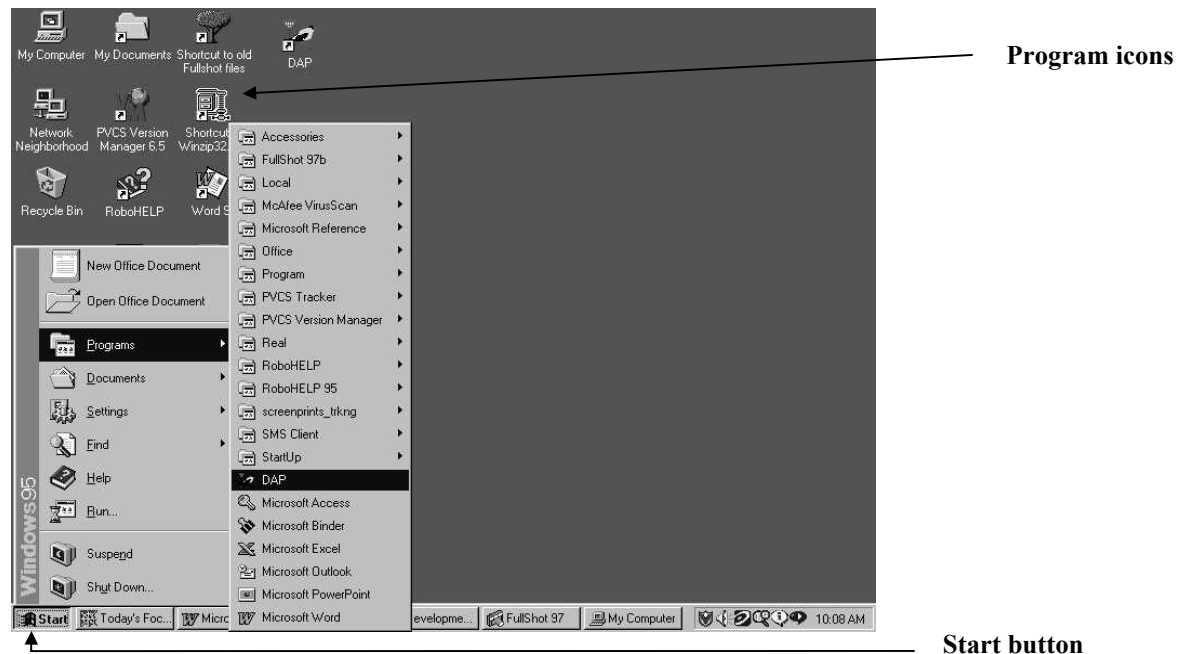
Figure 1. Desktop and Start Button

2.   Select **Programs** to display the menu options.

3.   Click **DAP** to start the system, and the **Development Application Processing (DAP Main)** window displays with the **Logon** window open (Figure 2). See Section 2.1.2 for instructions on how to log into the DAP system.

2.1.2   Logging into the DAP System

Two windows display after you launch the DAP system: the **DAP Main** window, and the **Logon** window (Figure 2). The **DAP Main** window is where you access all DAP subsystems for tracking and processing applications. This window is inactive and inaccessible until you log into DAP. The **Logon** window is a pop-up window that overlays the **DAP Main** window when you want to logon to DAP. Use this active window to enter your user logon information. After you successfully log in, the **DAP Main** window becomes active.
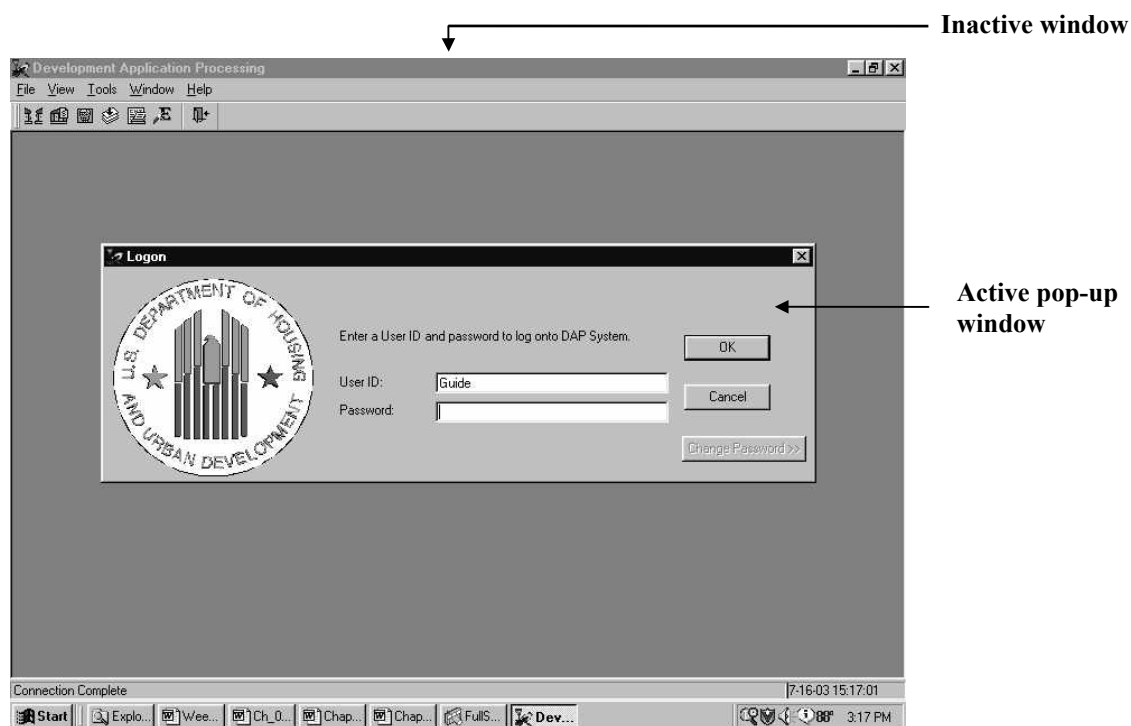
Figure 2. Logon Window

To logon to DAP:

1. Startup the DAP system, and the DAP Main window displays with the Logon window open (Figure 2).

2. Enter your user ID.
   Alternative Option

   Click ⌐Cancel⌐ to exit DAP, and return to your desktop.

3. Enter your password.

Alternative Option

Click [**Cancel**] to exit DAP, and return to your desktop.

4. Click [**OK**] to execute the logon (see Section 2.1.2).

Alternative Option

Click [**Cancel**] to exit DAP and return to your desktop.

5. If your logon is successful, the **Logon** window closes and the **DAP Main** window is active (Figure 3). If the user ID or password you entered is not correct, a warning window displays (Figure 4). Click [**OK**] to retry your logon.

✎   **Note:** *If you do not remember you password or need your password reset, contact the FHA Connection Help Desk.*

Figure 3. DAP Main Window

Figure 4. Invalid Logon Window

2.1.3   Exiting DAP

DAP closes all subsystem windows during the exit procedure. Remember to save all entries before exiting. If you do not save your work, a dialog window displays giving you the option to save.

To exit DAP:

1. From the **File** menu, select **Exit**, and a dialog box (Figure 5) displays to confirm your action.

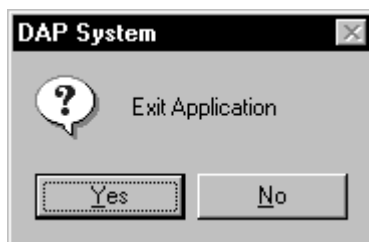**Figure 5. Exit DAP**

2. Click [Yes] to exit DAP and return to your desktop.

    Alternative Option

    Click [No] to remain logged onto DAP, and the dialog box closes.

2.2   Understanding DAP Security

The security features in DAP allow different levels of access to the system. Viewing sensitive financial information is restricted by level of access. While all DAP users can view project information, only those with authorization can make assignments and enter new applications. User access levels within DAP are discussed in Section 2.2.2. See Appendix B for details on the duties of staff responsible for DAP Security and steps involved in setting user access levels.

2.2.1   Changing Your Password

When you logon and your password has expired, the **Password Change Notification** window (Figure 6) prompts you to change it.

Figure 6. Password Change Notification Window

To change your password:

1. Click [OK] to close the notification window, and the **Logon** window displays.

2. Enter your *User ID* and *Password*, and the [Change Password >>] button becomes active.

3. Click [Change Password >>] and two fields display at the bottom of the **Logon** window (Figure 7).
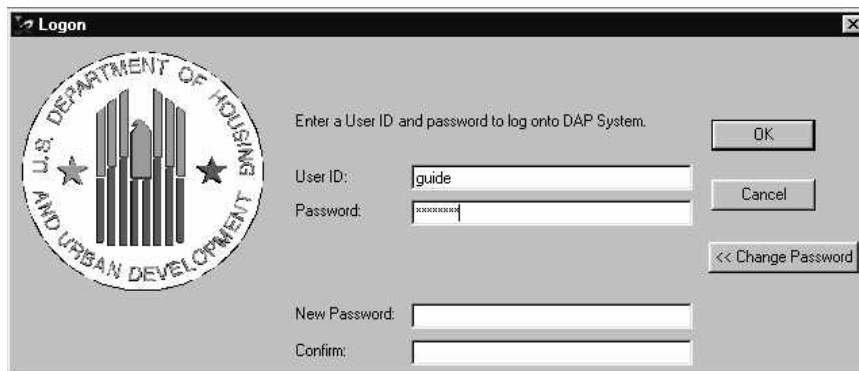
Figure 7. Change Password on the Logon Window

4. Enter your new password in the *New Password* textbox.

5. Enter your new password in the *Confirm* textbox.

6. Click [OK], the **Logon** window closes, and the **DAP Main** window becomes active.

2.2.2   User Access

Table 1 shows the access levels required to use various DAP functions. Designated staff at each lender office are responsible for entering users into the DAP system and granting them access at the appropriate level.

Table 1. DAP User Access by Function

Function	MAP Discipline Assignor	MAP User
Create assignments across offices.	X	
Create assignments within office.	X	
Enter new applications.	X	
Can be assigned work tasks/ assignments.	X	X
Update work tasks assigned to self.	X	X
Update Tracking data.	X	
View sensitive financial information.	X[*]	X[*]

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[*] The user is assigned to a specific discipline.

2.3   Using DAP Windows

The **DAP Main** window and the subsystem windows are the primary type of windows used in DAP. This section explains the window components, data entry and editing techniques, and how to move (or navigate) between open windows. You can use this information to help track and process loan applications in DAP.

2.3.1   DAP Main Window

The **DAP Main** window is the starting point for entering, processing, and tracking applications. From the **DAP Main** window you can enter a new application, retrieve an existing application and look up participants. You also can generate and print system reports and view data sets containing selected information from the DAP system.

2.3.1.1   DAP Main Window Components

The window components most frequently used on the **DAP Main** window are labeled in Figure 8 and described in Table 2. When the **DAP Main** window first displays, the **Logon** pop-up window is open and active, as indicated by its bold menu bar. The **DAP Main** window becomes inactive and inaccessible, as noted by its grayed out title bar (see Figure 8). After logging on, the **Logon** window closes and the **DAP Main** window becomes active.
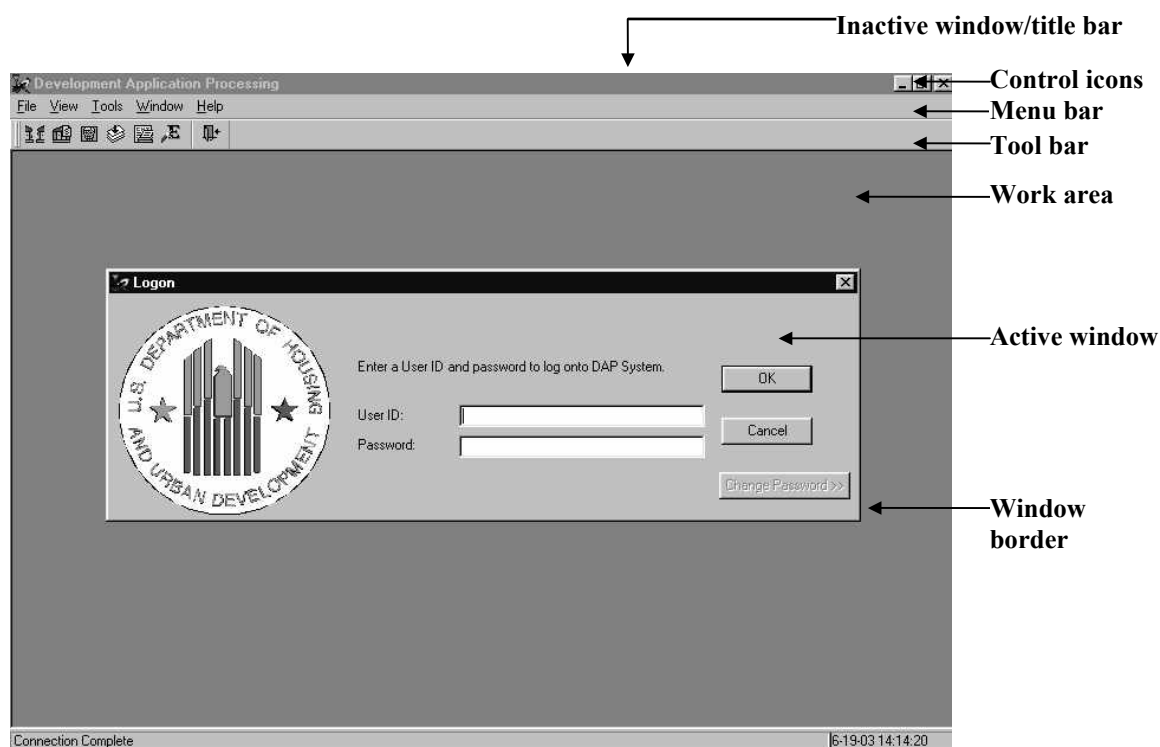

Figure 8. DAP Main Window Components

Table 2. Description of Main Window Components

Window Components	Description
Control Icons	Allow you to minimize ▭, maximize ▢, or close ✕ the **DAP Main** window and related dialog boxes and pop-up windows.
Dialog Boxes	Provide information 🛈, questions ❓, and warnings ⊗ that must be acknowledged or acted upon before you can proceed.
Menu Bar	Provides a drop down list of menu options on the **DAP Main** window, for performing tasks and functions in DAP's subsystems (see Section 2.3.1.2 and Section 2.3.2). The menu bar and menu options in DAP change based on the DAP window that is open and your level of access.
Title Bar	Displays the name of the window and control icons for the window and also denotes whether a window is active or not.
Toolbar	Displays buttons that you can use as a short cut to accessing a menu option. For a description of the DAP Main Window menu options, see Section 2.3.1.2. The toolbar that displays is based on the DAP window that is open.
Window (active and inactive)	A bold title bar indicates a window is active and accessible. An inactive window is *grayed out* and cannot be accessed as long as an active window or dialog box is open.
Window Border	Displays information inside a framed box on your desktop. You can reduce the size of the monitor's viewing area if you cannot see all data in a window (see Section 2.3.3).
Work Area	A block of space located below the toolbar used to display and work in DAP's subsystem windows.

2.3.1.2   Menu Bar and Toolbar

The menu bar, located under the title bar, displays options for processing DAP applications. The **DAP Main** window's menu bar and options are described in Section 2.3.1.2.1. The menu bar and options change based on the subsystem that is open and your level of access.

A drop down list contains menu options associated with the selected menu title. The symbols in Table 3 may display next to the options. Menu options that display in gray are not functional and cannot be selected.

Table 3. Menu Option Symbols

Symbol	Description
▶	A triangle to the right of a menu option indicates a cascading submenu of additional options.
...	An ellipsis to the right of a menu option indicates additional information is required before a menu option can be executed.
✓	A check mark to the left of a menu option indicates that the menu option is selected and active. You can click on the option to turn it on or off.
•	A dot to the left of a menu option indicates the option is selected and active.

2.3.1.2.1   Menu Bar and Options

The menu options listed below display on the **DAP Main** window (Figure 9 through Figure 12). Menu options that display in bold are active and usable.

File Menu

- **New–Processing**—allows you to opens the **New Processing–Application Search** window;

- **Open**—displays the **Administration, Participants**, or **Technical Processing** windows;

- **System Admin**—allows you to enter new users and establish security levels; and
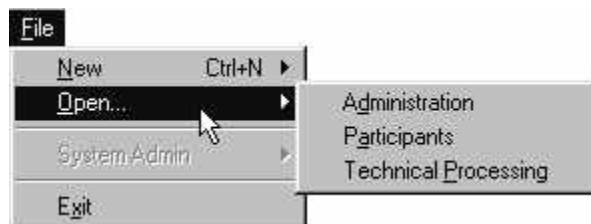
- **Exit**—allows you to exit the system.

Figure 9. File Menu - DAP Main Window

<u>V</u>iew Menu

- This menu is not available for users in lender offices.

<u>T</u>ools Menu

- **<u>C</u>ustomize <u>T</u>oolbars—**allows you to rearrange the Toolbar buttons.

Figure 10. Tools Menu - DAP Main Window

<u>W</u>indow Menu—this menu's options are not active on the **DAP Main Window**.

Figure 11. Window Menu - DAP Main Window

<u>H</u>elp Menu

- **About—**displays DAP system version and database connectivity information.

Figure 12. Help Menu - DAP Main Window

✎   **Note:** *The menu bar and menu options in DAP change based on the window that is open and the user's level of access.*

2.3.1.2.2   Toolbar

The toolbar, which is located under the menu bar, provides an alternate way to quickly access frequently used menu options. The active and inactive icons that display in the toolbar will vary based on the window or subsystem you open. The icons for the **DAP Main Window** toolbar are illustrated below in Figure 13.

Figure 13. Tool Bar for Main DAP Window

The following table describes the toolbar icons.

Table 4. DAP Main Window

Icon	Function
New Processing	Opens the **New Processing Tracking - Application Search** window to verify the new application is not already in DAP before entering it.
Administration	Opens the **Application Search** window to search the DAP database for an application already entered into DAP.
Participants	Opens the **Participants Search** window.
Technical	Opens the **Assignment Search** window to search the database for applications by type of assignment (e.g., A&E, Cost, Valuation, and Mortgage Credit).
Exit	Closes the DAP application and returns to the desktop.

✎   **Note:** *The toolbar in DAP changes based on the DAP window that is open and the user's access level (see Table 1).*

2.3.2   Subsystem Windows

There are five subsystems or disciplines that display in the work area on the **DAP Main** window:

- Tracking Administration
- Architectural and Engineering (A&E)
- Cost Analysis
- Valuation
- Mortgage Credit.

Each subsystem has a main window and additional detail windows for performing specific tasks, which you can use to track and process applications for mortgage insurance.

2.3.2.1   Window Components

Figure 14 illustrates how a subsystem window displays in the work area on the **DAP Main** window. Both the **DAP Main** window and subsystem window are active. Each window has a title bar and one or more control icons. Most subsystem windows have a view-only header, which displays the project name and number.

When another window displays in DAP, it becomes the active window that you can work in. All other open windows become inactive and inaccessible.
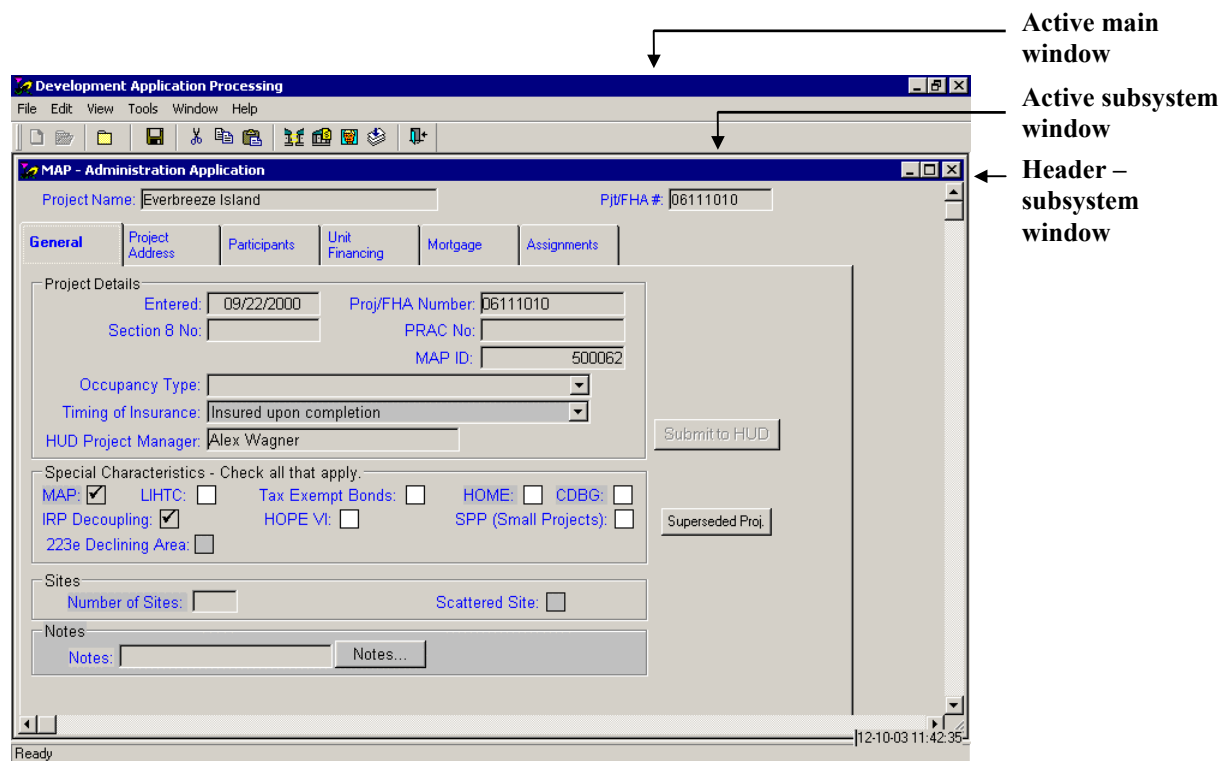

Figure 14. Subsystem Window Components

The components of the DAP subsystem windows are listed below in Table 5.

Table 5. Description of Subsystem Window Components

Window Components	Description
Control Icon	Allows you to minimize ⊟, maximize ☐, or close ☒ a window. Located in the title bar.
Dialog Box	Provides information ⓘ, questions ❓, and warnings ⊗ that must be acknowledged or acted upon before you can proceed (see Figure 6 for an example of a dialog box).
Header	Appears on most subsystem windows and displays reference information about the application (e.g., the project number and name).
Menu Bar	Provides a drop down list of options for completing tasks and functions. Inactive options are not functional and cannot be selected. For a description of the DAP Main Window menu options, see Section 2.3.1.2. The menu bar and options that display are based on the DAP window that is open.
Scroll Bar	Provides access to display information in windows, tables, and columns that is beyond the visible horizontal and/or vertical area.
Title Bar	Displays the name of the window and control icons for the window and also denotes whether a window is active or not.
Toolbar	Displays buttons that you can use as a short cut to accessing a menu option. For a description of the DAP Main Window menu options, see Section 2.3.1.2. The toolbar that displays is based on the DAP window that is open.
Window (active and inactive)	Active window: Displays a bold title bar. Any task you perform will affect the active window. Inactive window: Displays as grayed out title bar.
Window Border	Displays information inside a framed box on your desktop. You can reduce the size of the monitor's viewing area if you cannot see all information in a window (see Section 2.3.3).
Work Area	The designated space for displaying and processing information. DAP displays each subsystem's main window and subsequent detail windows. Each window has a title bar and some or all control icons.

2.3.2.2 Data Presentation

DAP uses several distinct formats for presenting information on the subsystem windows. The information on the subsystem windows is fixed in format. On windows that contain a list of information presented in table format, DAP does give you the ability to sort the data and adjust the columns to enhance the visual display. This section describes the components of the subsystem windows and explains how you can use them while viewing, entering, and editing application data.

2.3.2.2.1 Tab Pages

In addition to the standard window components, DAP uses tabs (similar to tabs on file folders) to display different types of data (Figure 15). The system displays one tab by default, as noted by the tab's name in bold letters. For example, when you open the Tracking Administration subsystem, the General tab displays as the default tab. The remaining tabs are stacked behind. You can display only one tab at a time. To display the window associated with a tab, you must click on the tab.
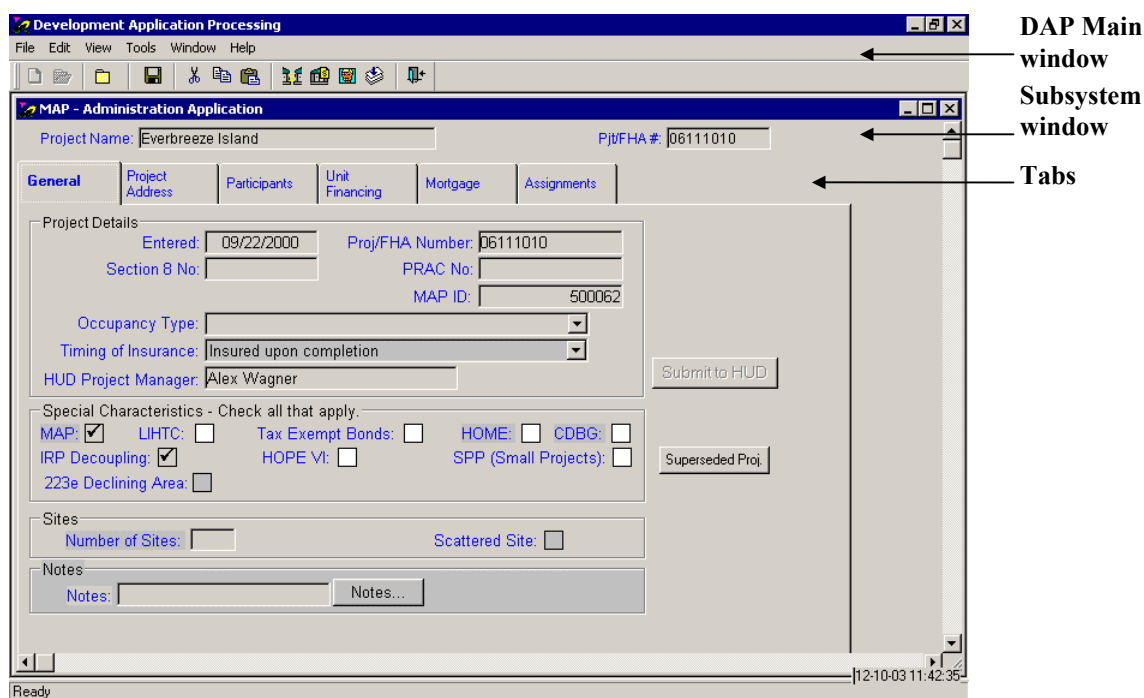

Figure 15. Tabs

2.3.2.2.2 Data Tables

On the individual tabs, tables are often used to present data in DAP. Line items in some tables contain detail information that you can access by double clicking on the item. You can change column widths (Figure 16) and also sort data in a table in ascending or descending order (Figure 17), based on the column selected.

To size a column:

1. Place the mouse pointer on a column divider (Figure 16), and the cursor changes to a double arrow (✛)

2. Click and hold the left mouse button and drag the column divider to a new location.

3. Release the mouse button, and the system adjusts the column to the new width.
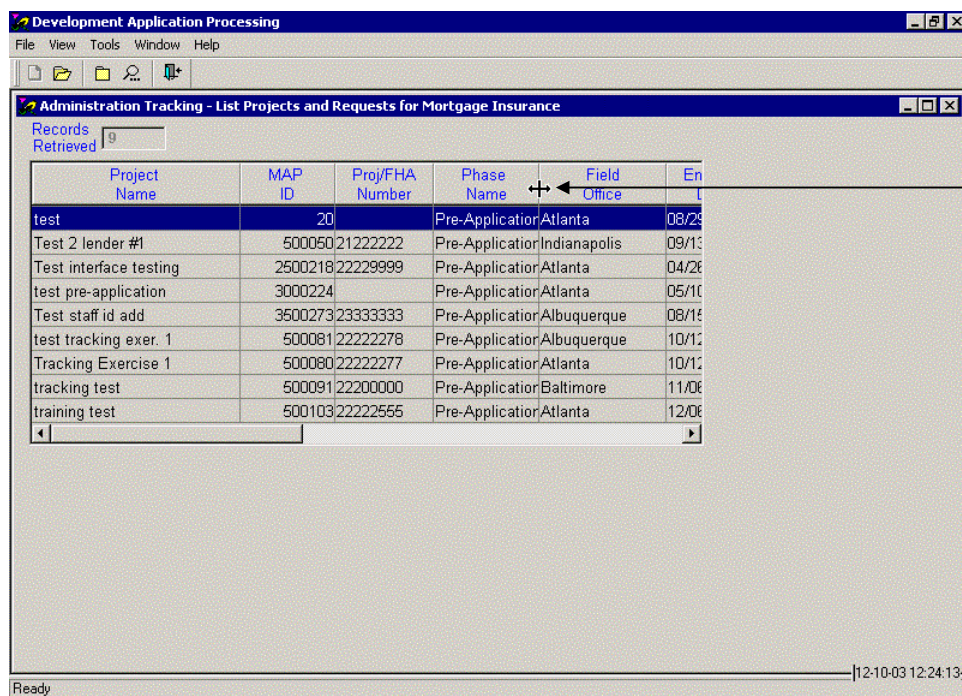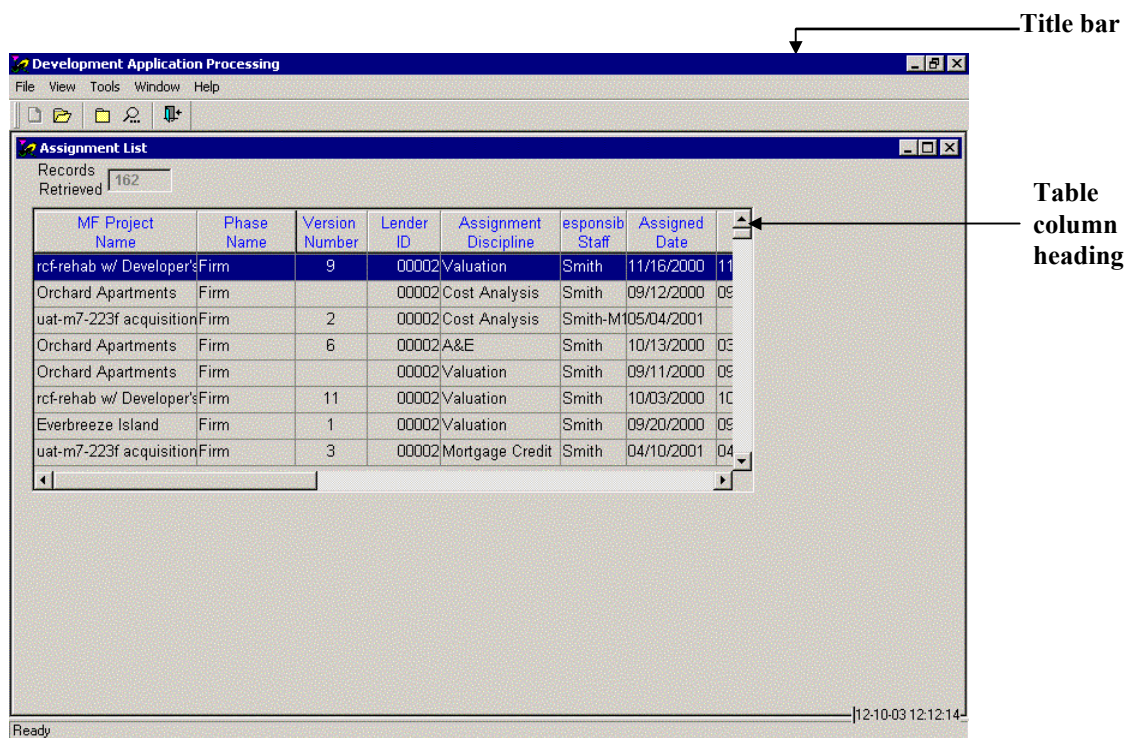

Figure 16. Resizing a Column

To sort table entries:

1. Click on the column heading, and the table reorders the data alphabetically (from A to Z), as shown in Figure 17, or numerically (low to high).

2. Click on the same column heading again to reverse the sort sequence (from Z to A or high to low).

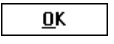**Figure 17. Table Sorted Alphabetically by Phase Name**

2.3.3 Changing the Monitor Display

While you can change the size of your monitor display, the DAP system is best viewed when your monitor is set to display a desktop area of 800 by 600 pixels.

> ✍ **Note:** *When you change your monitor display, the new settings apply to all software systems and applications not just DAP. To return to your original settings, follow the instructions below and in step 6 select your prior Display area.*

To change the display properties:

1. Click **Start** on your desktop, and the Start menu displays.

2. Select **Settings** from the Start menu, and the sub-menu displays.

3. Select **Control Panel** from the sub-menu, and the **Control Panel** window displays.

4. Double click on the Display icon, and the **Display Properties** window opens.

5. Click on the Settings tab to display the available features.

6. Locate the Display area section, and drag the **Screen** and **Desktop** arrows until they are set to 800 x 600.

7. Click **Apply**, to save the new display properties and the **Display Properties** window displays.

8. Click **OK** to close the **Display Properties** window and return to the desktop.

9. Close the **Control Panel** window, and the desktop displays with the new settings in effect.

2.4   Entering and Managing Data

DAP uses shortcuts for entering and editing data. A two-button mouse works best to take advantage of these features. The left button selects items, words, and options in windows. The right button is a shortcut to displaying the pop-up **Edit** menu (see Section 2.4.2). This section discusses the data entry components most frequently used in DAP. The DAP information that you can view, enter, and edit will depend on your authorized level of access.

2.4.1   Entering Data

Figure 18 shows the data entry components that are commonly used in DAP. When DAP displays a field name in bold, the field is required, meaning you must enter that data before you can proceed to another window.

Figure 18. Data Entry Components

2.4.1.1 Text box

DAP uses fields, called text boxes, to collect text data, as illustrated in Figure 18 above.

When a text box displays in white, it is called an ***active text box***. You can enter/edit and delete information in an active text box. When a text box is gray, it is an ***inactive text box***, and you can view, but not change, the information in the box.

Most text boxes are ***unformatted text boxes***, in which you can enter both characters and numbers. DAP also has a number of ***formatted text boxes***, usually for entering numeric

information, e.g., monetary amounts and percentages (Figure 19). When you enter this type of information, DAP automatically inserts formatting characters (e.g., decimal point and commas) to improve the readability of the data.

Figure 19. Formatted Text Box

2.4.1.2 Check box

A check box (Figure 18) is a "yes/no" indicator for an item (e.g., whether or not the project will receive proceeds from the sale of Low Income Housing Tax Credits (LIHTC)). Click on a check box to indicate "yes", and a check mark (✔) appears in the box. Click on the box again to remove the check mark.

2.4.1.3 Radio buttons

Radio buttons (Figure 18) are used to select one of two choices for an item. A dot displays inside the selected radio button.

2.4.1.4 Drop down list box

A drop down list box (Figure 18) contains a list of choices for an item. You must make a selection from the list and cannot enter in a different choice. To display the list of choices, click on the drop down arrow located to the right of the drop down list box. After you make a selection the drop down list closes and your choice is displayed in the field.

2.4.1.5 Command buttons

Command buttons (Figure 18) are used primarily to signal DAP that you want the system to perform an activity (e.g., save or cancel the data entered, close the window). These buttons also are used to navigate from one window to another (e.g., to go to a previous or next window).

2.4.2   Editing Data

Most active text fields in DAP are editable. Inactive (grayed) text fields cannot be changed. This section describes how to select text and apply a menu option to the text (e.g., paste the selected text).

2.4.2.1   Select Edit Options

A few edit options are located directly on DAP windows (e.g., **Re<u>s</u>et** on the **Application Search** window clears all of your search criteria so you can enter new criteria). This section covers the three main ways of accessing edit menu options:

- **<u>E</u>dit menu:** You access most edit options from the menu bar on the **DAP Main** window. The active options in the **<u>E</u>dit** drop down list vary based on the subsystem window that is open.

- **Edit pop-up menu:** Use your mouse to display this shortcut menu.

- **Toolbar:** You can use the icons (e.g., Copy and Paste) located on the **DAP Main** window as a short cut to accessing options that are located in the **<u>E</u>dit** menu.

The active menu options that display vary based on the subsystem window that is open.

To select an option from the <u>E</u>dit menu:

1. Highlight the item that needs editing.

2. Click on the **<u>E</u>dit** menu title, and the options display in a drop down list (Figure 20).

Figure 20. Edit Menu

3. Click on the appropriate option, and the option is applied.

To select an option from the Edit pop-up menu:

1. Highlight the item that needs editing.

2. Click the right mouse button, and the **Edit** pop-up menu displays (Figure 21).

Figure 21. Edit Pop-up Menu from Right Mouse Click

3. Click the appropriate menu option, and the pop-up menu closes and the option is applied.

2.4.2.2 Drag and Drop Data

In addition to using the editing capabilities just discussed, you can use the Drag and Drop technique to copy and paste data from one field to another in DAP.

To copy by dragging and dropping:

1. Move the mouse pointer to the item you want to copy (the "copy from" field).

2. Press and hold the mouse button and drag (move) the pointer to the field receiving the copied data (the "copy to" field).

   The mouse pointer becomes a square.

3. Drop the data in the "copy to" field by releasing the left mouse button, and the mouse pointer displays.

4. View the copied data by clicking on the "copy to" field.

2.4.2.3   Reset and Clear Data

When the reset option is available, it displays as a button on the applicable window. This option removes all data that you entered including drop down list selections. When you reset or clear a required field, be sure to re-enter data and save.

To reset all data fields:

1. Click ⬚ Reset ⬚ and the data fields become blank.

2. Enter new data and perform a function, or close the window.
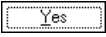
To clear the drop down list box:

1. Double click on the drop down list arrow to select the entry in the drop down list box.

2. From the **Edit** menu, select **Clear** and the drop down list box is now blank.

2.4.3   Deleting Data

In DAP, you can delete most data that is not inactive (grayed out). In most functions, a delete button or toolbar icon allows you to delete information. This section describes how to delete the various types of data in DAP.

You can delete text data, in a data entry field or Notes text box, by using the backspace key or the edit pop-up menu option. To delete numeric data, you can highlight the data and use the backspace key to delete all entries including the dollar sign, or use the '0' numeric key to 'zero out' the number, leaving the dollar sign.

To delete text data:

1. Highlight the data you want to delete.

2. Click the right mouse button, and the **Edit** menu opens.

3. Select the **<u>D</u>elete** option, and the Confirm Delete message asks if you are sure you want to delete the item.

4. Click <u>Yes</u> to delete the item.

   Alternative Option

   Highlight the data you want to delete and press the backspace key to delete the data.

To delete numeric data:

1. Highlight the numeric data you want to delete.
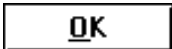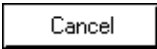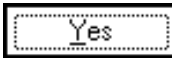
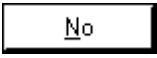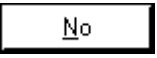2. Press the backspace key to delete the data.
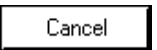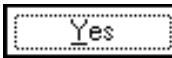
   Alternative Option

   Use the '0' numeric key to 'zero out' the data.

2.4.4   Alternative Options for Command Buttons

The command buttons that display on windows and dialog boxes allow you to execute functions in DAP. When two or more command buttons are available, use one to proceed with executing your work and the other to perform a different action. The steps in this guide tell you when to select a command button to complete DAP work. Table 6 shows the alternate command buttons that you can optionally use.

Table 6. Alternative Options for Command Buttons.

When the next step is click on . . .	You can optionally click on . . .
OK to execute a function (e.g., change project name or project status).	**Cancel** to not complete the action.
Yes to save your work before executing another function (e.g., save before closing, save before exiting).	**No** to not save but still execute the next function. OR **Cancel** to not save and not complete the next function.
Yes to exit DAP.	**No** to stay logged onto DAP.
Search to search the database.	**Cancel** to not search the database. OR **Reset** to delete your search criteria and optionally enter new search criteria.